



New Student Contacts Procedures

2007-2008

A new, relationship-based system of student contacts is now the required method for adding and editing contact. This enhancement by X2, allows school staff and students to establish accurate records based on an actual person. This will allow the school department to use the full complement of services and procedures available in X2. The concept of a one person record allows the same record be used for a person as they migrate from student, to staff, or to a contact for their own children.

SOME OF THE BENEFITS

- ★ Accurate contact information including which contacts have the authority to pickup a student or act on the student's behalf. Contact information can be shared across students and families.
- ★ Allows the proper management of the new Special Needs View in X2 and the Special Needs Workflow.
- ★ Multiple mailings of conduct incidents, report cards, progress reports and other communications to more than one parent/guardian in the home language of the contact.
- ★ Sets the groundwork for the use of the community portal in X2 in which students and families can access information on their children.

OLD METHOD

- A single, flat Parent/Guardian field attached to the Student Record in X2 allowed only a single contact. Phone information was also attached to this student record. The Parent/Guardian field did not allow for additional parents or guardians to be added.

NEW METHOD

- All student contacts are entered individually on the Student Details page or the Student Contacts Side-Tab.
- Student Contacts now appear at the bottom of the Student Details page, in addition to the Contacts Side-Tab. This allows quicker access to the more important fields by school staff.

START OF SCHOOL PROCEDURES TO FOLLOW – September 2007

1. Each school must run the X2 report "**Student Profile Verification (New)**" from the Student Tab in X2 for all students. The report can also be accessed on the Contact Side-Tab for an individual student. There are options in this view, which include, groups of students where the results can be ordered differently for distribution (ex. by homeroom).
2. Printed sheets should be given to all students to bring home for review. A short timetable for return should be communicated with this sheet.
 - a. Parent/Guardians are encouraged to edit, remove or add contacts to the bottom portion of the profile sheet. In many cases, contacts may not be listed so they will need to be added to the profile.
 - b. There are fields for yeas or no responses can be entered for each contact pertaining to permission for student pickup or specific custody situations.
3. Office staff will be required to make correction data entry to all information contained on returned forms. Please contact Joyce Landry, if the correction involves SIMS related fields. Contacts can be removed by checking the item and then using the Delete button at the bottom of the page. **DO NOT use Options > Delete**
4. Please refer to the next page to add new contacts.

ADDING A NEW STUDENT CONTACT

Since students, staff and contacts now point back to a single person record in X2, it is important that the adding new contacts procedure is followed. Secondly, another step in this procedure is the merging of duplicate person records into a single, all encompassing record.

OPTION 1

Use this option if you are sure that this contact has:

- never been a contact for any student in Fall River
- has not been a student or a staff member in Fall River in the past 5 years.

- 1 Options > Add on the Contact Side-Tab or Click Add at the Bottom of the Student Details
- 2 Fill in information on the screen for the contact.
- 3 SAVE

OPTION 2

Use this option if you are sure that this contact has:

- has been a contact for any student in Fall River
- has been a student or a staff member in Fall River in the past 5 years.
- is unsure of they have been a contact, student or staff member within the past 5 years.

- 1 Options > Add on the Contact Side-Tab or Click Add at the Bottom of the Student Details
- 2 A blank contact information screen appears.
- 3 Click the blue magnifying glass picklist , next to LAST NAME to display the picklist of all past and present contacts.
- 4 Select the contact from the list and click OK. The contact information will automatically populate the screen.
- 5 Review the imported contact information and edit as needed.

★ If more than one contact appears on the popup with the same information, you may need to review each before selecting the correct contact.

The screenshot shows a web browser window displaying the 'X2 School District: Student - Mozilla Firefox' interface. The page title is 'Students :: 09 - Zhang, Yuee :: New Student Contact'. The form is divided into several sections: 'Details', 'Contacts', 'Attendance', 'Conduct', 'Transcript', 'Assessments', 'Schedule', 'Membership', 'Transactions', 'Documents', and 'Snapshots'. The 'Contacts' section is currently active, showing fields for 'First name' (James), 'Middle name' (None), and 'Last name' (Neuborn). A red arrow points to a magnifying glass icon next to the 'Last name' field. Other fields include 'Emergency priority' (0), 'Relationship' (Father), and 'Gender' (M). There are also checkboxes for 'Lives With Student?', 'Pickup Student?', 'Receive grade mailing', 'Receive conduct mailing', and 'Receive other mailing'. A text area for 'Type any free text notes here' is visible at the bottom.